

CONSUMER MARKETING REPORT

Presented to the
Montana Tourism Advisory Council

Katy Peterson
Montana Office of Tourism
Sidney, Montana
October 6, 2010

AGENDA

- + Background on FY2010 Efforts
- + Results, Findings & Insights
- + FY2011 Strategy
- + Creative Evolution
 - + Winter push
 - + Year-round
- + Media Recommendations
 - + Winter push
 - + Year-round
- + Q&A

BACKGROUND

- + Aligned campaign goals and objectives with Montana Office of Tourism's goals, objectives, priorities and strategies.
 - + Increase awareness of the brand among target audience
 - + Move Montana into the target audience's consideration set
 - + Increase in state/regional travel
- + Implemented a strategic media approach:
 - + Create a multifaceted campaign that
 - + Builds awareness among first-time visitors
 - + Drives consideration and preference among repeat visitors
 - + Drives visitation by Montanans
- + Media objective:
 - + Bring Montana to life through media mediums leveraging visuals, artists, local expert/guides and personalities.

BACKGROUND

Creative executions and placements included:

- + Print

- + *National Geographic*
- + *The New Yorker*
- + *Budget Travel*
- + *Outside*

- + Out of Home (WA, MN, IL)

- + Bus wraps
- + Billboards

- + Online

- + Discovery
- + Yahoo!
- + Travel Channel
- + Backpacker

- + Broadcast

- + In-state

- + Radio

- + Key Markets
- + In-state

RESULTS, FINDINGS & INSIGHTS

- + Campaign Results
- + Market Research
- + Insights & Recommendation

RESULTS

- + 2010 Brand Awareness Study (see previous report)
- + Online Campaign Results
 - + Online campaigns see a higher CTR than industry average, between 0.09% - 0.28%
 - + Brand messaging consistently outperforms activity-specific creative
 - + Highest performing content relevant online placements include National Geographic Traveler (0.53% CTR), Backpacker (0.64% CTR) and Trip Advisor (0.46% CTR)
 - + Highest performing behavioral targeted online placements are on Yahoo! (0.46% CTR)

FINDINGS

Travel Planning & Visitation:

- + Geotraveler visitation (intent):
 - + 56% Summer
 - + 49% Fall
 - + 30% Spring
 - + 7% Winter
- + 74% of the target travel to Montana April – September

(National Geographic Reader Survey, May 2010; ITRR Quarterly Travel, 2009)

FINDINGS

Winter-specific:

- + Winter visitation by non-residents: 40% have immediate or extended family in Montana
- + Non-resident winter sources of information:
 - + 54% Ski Area homepage
 - + 45% Internet search engine
 - + 31% WOM
- + Ski areas are selected primarily for location:
 - + 70% residents
 - + 30% non-residents
- + Combined economic impact of skiing (2009-10): \$83 MM
- + Total tourism industry economic impact (2009): \$2.3 BN
- + Top 5 places non-residents visit from: ALB, MN, WA, ND, CA

(Source: ITRR)

FINDINGS

Trip Planning & Visitation (Other Studies):

- + Winter Campaign Conversion (SMARI, 2004)
 - 23% of winter leads converted in winter; 77% converted in spring/summer/fall
- + Winter Campaign Conversion (SMARI, 2006)
 - 94% of winter ad aware plan on traveling in spring/summer/fall
 - 36% of winter leads converted in winter; 64% converted in spring/summer/fall
- + Warm Season Campaign Conversion (SMARI, 2008)
 - 64% of WS conversions came June-Sept
 - 36% came off-peak (Oct-May)
 - 6% came in winter specifically (Dec-Mar)
 - 17% of MontanaKids! Conversions came in winter (Dec-Mar)

INSIGHTS

Seasonal Direction

- + **BRAND:** Season-neutral (all-season) to geotraveler audience
 - + Greatest opportunity for visitation is warm season
 - + National Parks still the gateway driver overall
 - + Go beyond parks to showcase the depth and variety of opportunities
 - + For repeat visitor or as more in-depth information
- + **WINTER:** Tailor communications to niche audience
 - + Winter visitation is for a specific reason (Skiing)
 - + “Parkas” represent a small audience
 - + Continue to promote winter/ski, but integrate all-season messaging for efficiency
 - + Co-op efforts to more effectively deliver ski message

MESSAGING STRATEGY

Focus efforts on season neutrality for national branding message. Follow through with regional efforts specific to seasonality. Target accordingly.

- + BRAND:
 - + National / first-time visitor messaging
 - + Initial touchpoints
- + SEASON-SPECIFIC:
 - + Regional / return visitor messaging
 - + On-going communications

FY11 STRATEGY

- + MTOT Strategic Plan & Objectives
- + Opportunities
- + Target Audience
- + Media & Timing
- + Messaging Overview
- + Creative Evolution
 - + Strategy
 - + Executions

MTOT STRATEGIC PLAN

MONTANA TOURISM AND RECREATION STRATEGIC PLAN 2008-2012

Turning the Montana Tourism Vision into Reality

MONTANA OFFICE OF TOURISM JULY 2010-JUNE 2011 TOURISM MARKETING PLAN

Mission: Strengthen Montana's economy through the promotion
of the state as a vacation destination

DIVISION GOAL 1:

Increase awareness of the brand
among the target audience

OBJECTIVE 1:

Increase the target audience's
awareness of the brand by 3
percentage points by June 2011

DIVISION GOAL 2:

Move Montana into the target
audience's consideration set

OBJECTIVE 2:

Increase the target audience's
intent to travel to Montana by 2
percentage points by June 2011

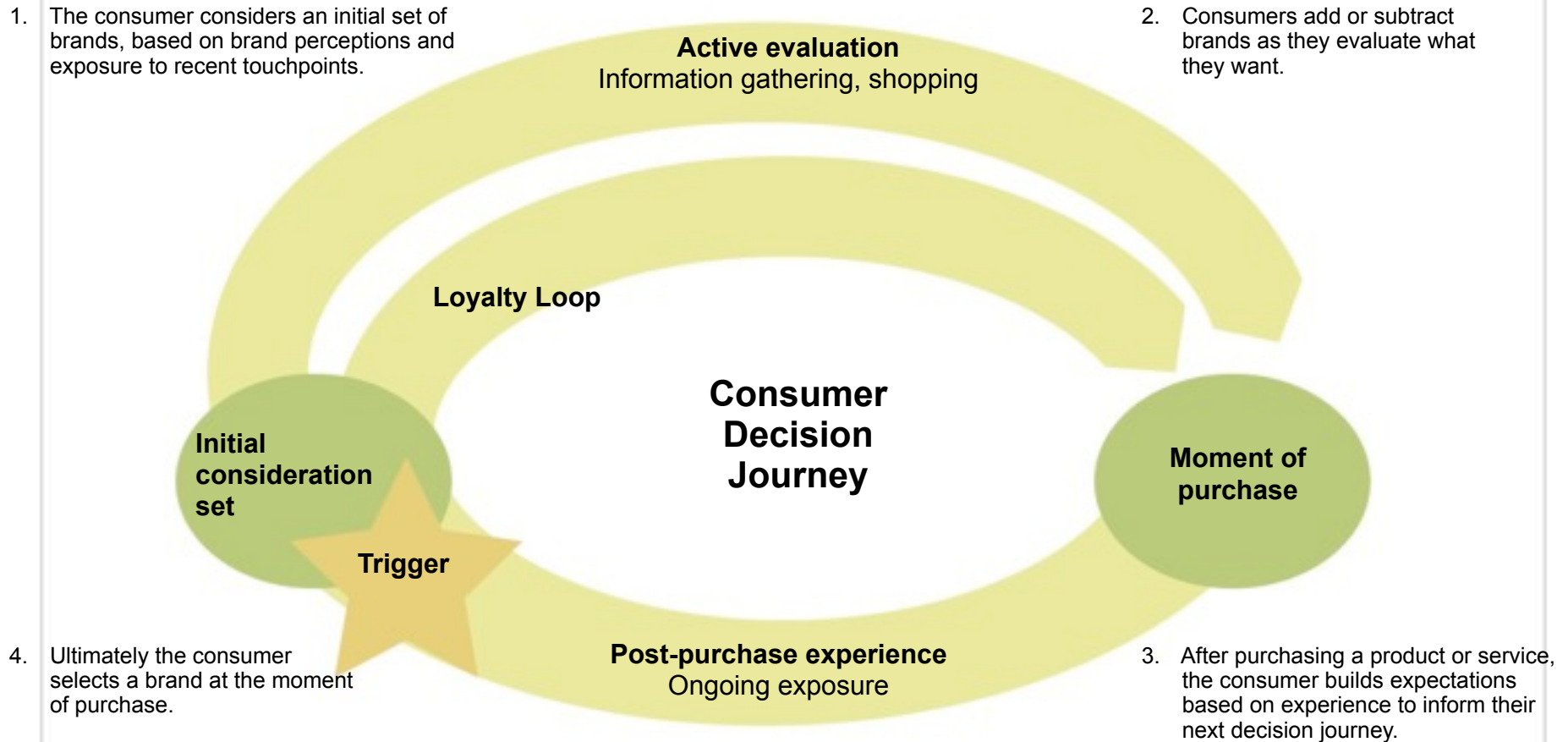
DIVISION GOAL 3:

Support Montana tourism entities
in increasing their revenues

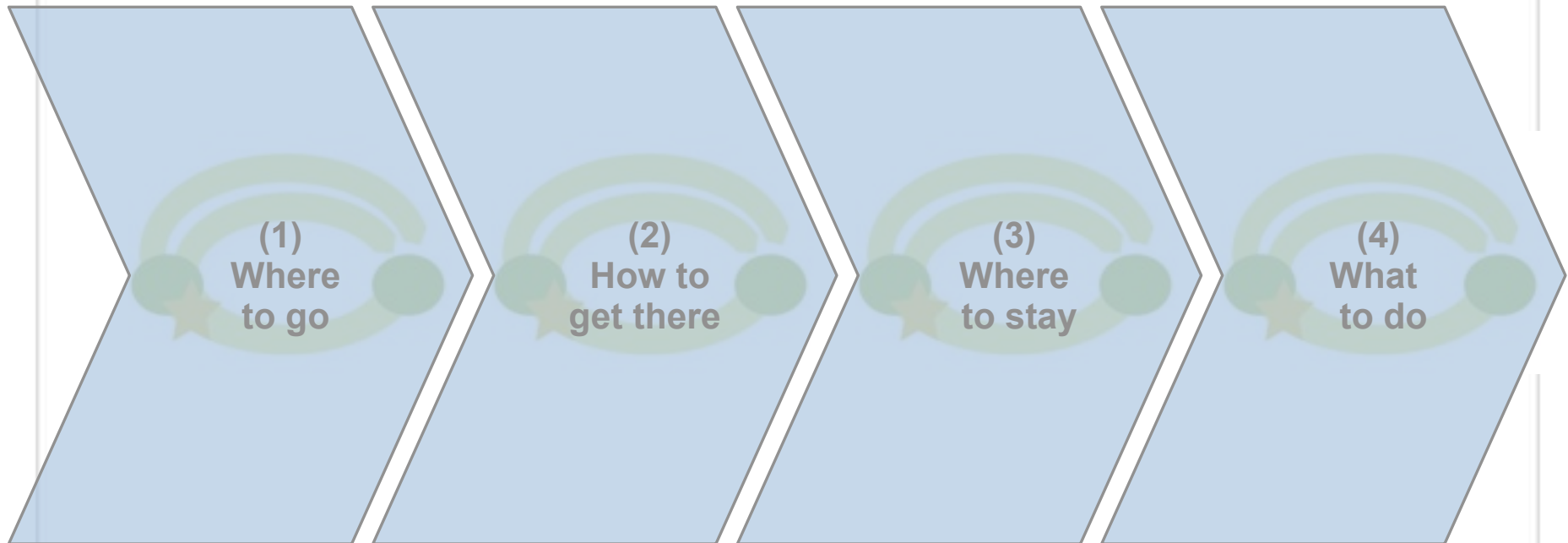
OBJECTIVE 3:

Support the return of annual,
non-resident expenditures in
2010 to the 2005 level
of \$3.037 billion

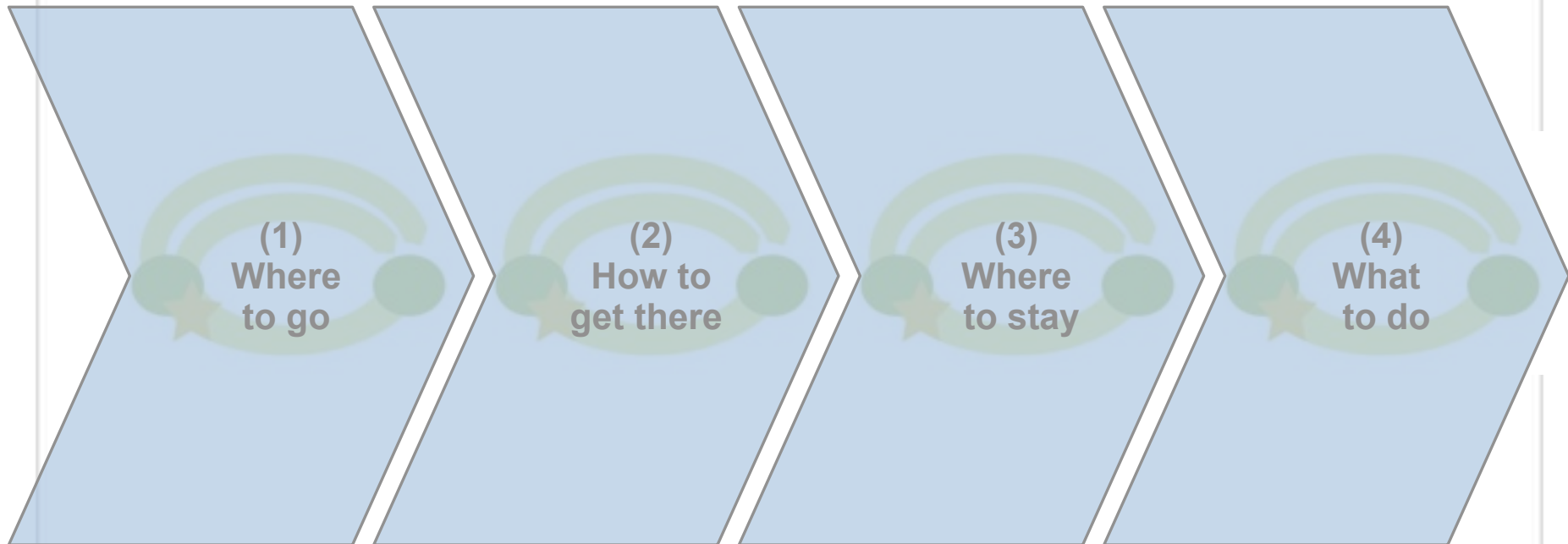
OPPORTUNITIES



OPPORTUNITIES



OPPORTUNITIES



- Traditional
- OOH
- Online Ads
- Digital/Web
- Social

- Digital/Web

- Digital/Web
- Social

- Traditional
- Digital/Web
- Social

FY11 BRAND STRATEGY: Target

1. Brand (national)
 - + The Montana visitor:
 - Is a Geotraveler (group of 46.4 million US residents)
 - Challenges their comfort level
 - Desires personal enrichment through culture / place
 - Seeks authenticity of people and place
2. Season specific (regional / return visitor)
 - + The winter visitor:
 - Is less of a “visitor”, more of neighbor or resident
 - Has niche identified (skiing, wildlife viewing, etc.)
 - May have relatives within Montana (reason for travel)
 - Is located in-state, regionally or within a key market

FY11 BRAND STRATEGY: Media & Timing

1. Brand: National / first-time visitor
 - + Year round / season neutral
 - Print
 - Online
 - Direct email
2. Season specific: Regional / return visitor
 - + Winter / shoulder (Q3-4)
 - Print
 - Online
 - Direct email
 - Other opportunities

FY11 BRAND STRATEGY: Message

1. Brand: National / first-time visitor
 - + Brand pillars
 - + Bottom line:
 - Keep Montana top of mind
 - Tell the deeper story as much as possible

2. Season specific: Regional / return visitor
 - + Experience Montana
 - + Bottom line:
 - Provide relevant content
 - Tell an even deeper story to an audience who is already familiar with Montana
 - Speak to trip planning specifics

CREATIVE STRATEGY & EXECUTION
CREATIVE EVOLUTION

MONTANA

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FY11 CREATIVE STRATEGY

GOAL:

- + Keep Montana top-of-mind regardless of time of year.
- + Be fresh in a heavily penetrated marketing arena.

STORY:

- + A balance of all three brand pillars.

EMOTION STRATEGY:

- + The voices of charismatic, adventurous, thoughtful recognizable Montana residents unfold the story that Montana's unspoiled landscapes and small town charms create a haven for vibrant, adventurous, self-actuated people and provide a fertile growing place for great works.

FY11 CREATIVE STRATEGY

VOICE:

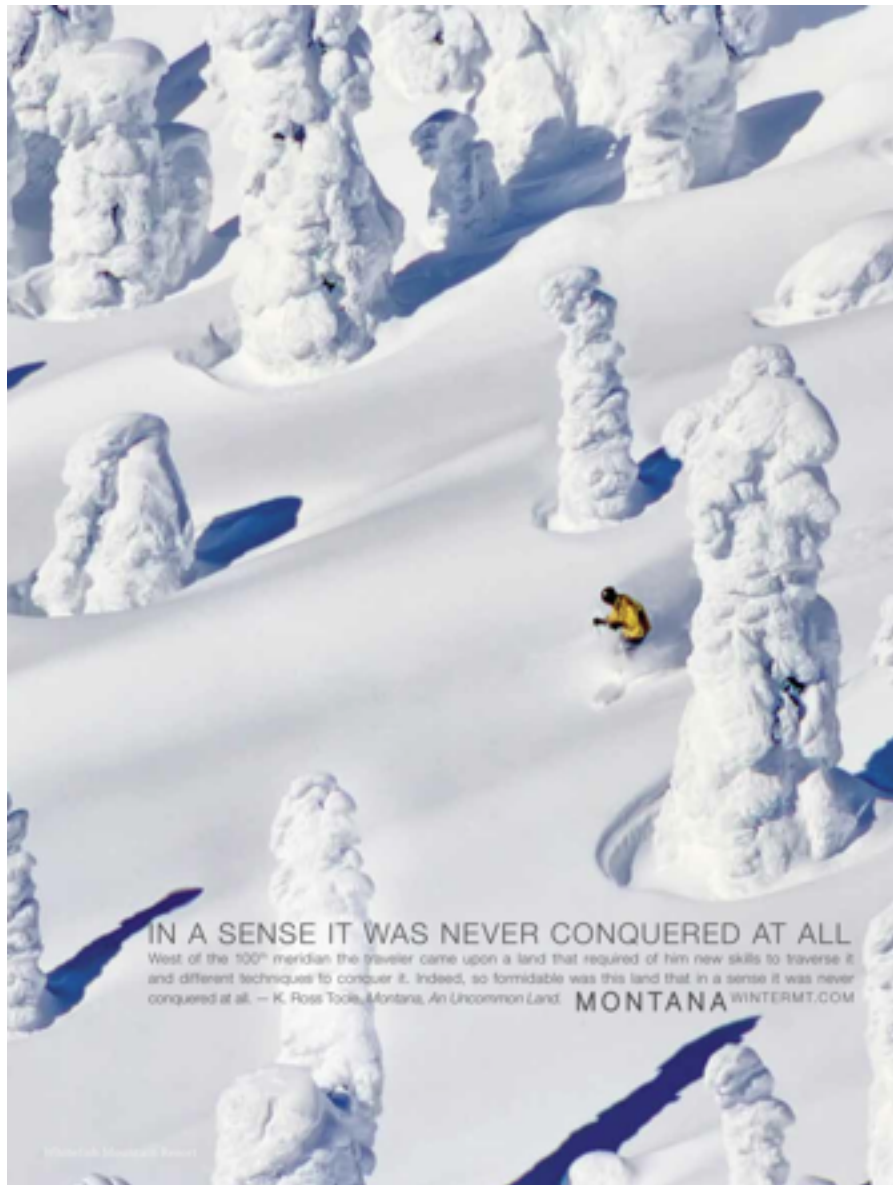
- + Candid, direct, conversational, personal, intimate. Sometimes funny. Somewhat unvarnished. Authentic voices, not spokes models. Real conversations, directed only by the questions we ask.

IMAGERY:

- + Spectacular, unspoiled landscapes, images of the storyteller engaged with the landscape and in Montana settings that support the idea of small town charm, possibly interacting with locals.

FY11 CREATIVE EVOLUTION

- + Current Executions & Opportunities
- + Influencer Recommendations



IN A SENSE IT WAS NEVER CONQUERED AT ALL

West of the 100th meridian the traveler came upon a land that required of him new skills to traverse it and different techniques to conquer it. Indeed, so formidable was this land that in a sense it was never conquered at all. — K. Ross Toole, *Montana, An Uncommon Land*

MONTANA WINTERMT.COM

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Moonsight Basin Ski Area, Big Sky

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National
Geographic
Traveler

SPECIAL
SECTION

advertisement

Winter onderland



That chill in the air, glistening snowflakes, and frosty windows can mean only one thing—winter's here! The country's best mountain hot spots are beckoning you to come out and play. Whether you're a downhill skier, snowboarder, or cross-country skier, fresh powder snow and thousands of miles of terrain await. You'll discover new activities such as dogsledding, snowshoeing, ziplining, and snow tubing to explore. Afterwards, indulge in relaxing massages, unwind in cozy pubs, browse through unique shops and galleries, and dine in world-class restaurants. It's time to get out and explore the winter wonderland in your own backyard.

Skier reaches summit at dusk (above).
Dogsledding, Big Sky, Montana (below).

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MTOT opening spread – full page advertorial and ad



Gateway to Yellowstone National Park (left). Bluebird day at Whitefish Mountain Resort (top right). Dog sledding near Yellowstone National Park (bottom right).

From Yellowstone to Glacier National Park and all the off-the-beaten-path winter experiences in between, Montana offers a range of options to indulge nearly every wintry whim. Reconnect with winter at Yellowstone National Park and watch the world-famous geysers and hot spots interplay with deep snow while wild animals roam. Indulge in the solitude of Glacier National Park, aptly named the "Crown of the Continent," and witness sparkling rugged peaks. Or, delight in the thrill of carving powder turns at one of Montana's 16 ski hills by day while feasting on local flavors at night.

THE YELLOWSTONE NATIONAL PARK AREA

Try a high-speed quad of a different sort this winter by hopping a ride in a heated snowcoach and heading into the frosty

splendor of Yellowstone National Park. Set out from West Yellowstone, just 45 minutes from Big Sky, to discover the megafauna and steaming geothermal splendor of the nation's first national park, either on your own or with a guide. Not far from Yellowstone National Park, aspiring dog sledders can experience the exhilaration of husky power. Choose an outfitter to put you at the helm of your very own sled and take a half-day tour into this winter wonderland. After the long day, evenings at any of the cozy cabins, hot springs resorts, or four-star hotels located in Gardiner, West Yellowstone, or Cooke City. These gateway communities provide ideal base camps from which to snowshoe, view wildlife, or simply take in the iconic landscapes.

MAJESTIC GLACIER NATIONAL PARK

Find peaceful scenery and serenity in Glacier National Park, where more than one million acres of majestic vistas are accessible by dozens of trails. Just outside the park, national and state forests and ski centers provide the backdrop to explore

forested glades, crystallized creeks, and the wildlife that call Montana home.

After the day's adventure of outdoor fun, catching snowflakes on your tongue, or power shopping, treat yourself to some SPA with a spa treatment in Bigfork or Whitefish. To warm up your insides, finish the day with a steaming bowl of chicken and dumplings or a local microbrew near Whitefish or Kalispell.

Visit wintermt.com to begin your Montana winter experience.



Snowcoach tour in Yellowstone National Park



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Montana Co-Ops – Advertorial and ad

Bountiful Big Sky Resort

advertisement

More than 400 inches of snowfall, 3,812 skiable acres, a terrain park that opens after the trails close, and 4,350 vertical feet combine to create The Biggest Skiing in America®. Big Sky Resort delivers when it comes to diverse terrain, a host of outdoor activities, abundant wildlife in Yellowstone National Park, family fun, hospitality, and adventure. And, because the resort is so expansive, you'll never find long lift lines.



Skiing off of the Challenger Lift on opening day at Big Sky Resort. Photo by Chad Jones.

OUTDOOR ESCAPADES

With so much land to discover, downhill skiers and boarders will delight in exploring the powder-filled bowl beneath Lone Peak and weaving through the Bavarian Forest. Technical skiers and riders can hop aboard the Lone Peak Tram to some of the most difficult terrain in the country. Less advanced skiers will enjoy the panoramic views of three states, Yellowstone and Teton National Parks, and dozens of

peaks. Off-slope, other activities include snowshoeing, snowmobiling, horseback riding, winter fly-fishing on the Gallatin River, snowcoach tours into Yellowstone National Park, and more. Kids of all ages will enjoy the 300-foot-long tube park and ice skating at Fire Pit Park at the base of the lifts at Big Sky. For a thrilling adventure, check out the ski-in/ski-out alpine at Big Sky Resort, where you'll fly

303 feet, high above the ground through Moose Tracks Forest, or Big Sky's new ropes course, featuring more than ten elements suspended 50 to 30 feet above the ground.

APRÈS-SKI

After a long day tearing up the slopes or creating your own outdoor adventure, relax and take in the local après-ski atmosphere. Sip your favorite beverage and locally brewed beer while enjoying live music and good conversation. Or, pamper yourself with a relaxing massage at the spa and a dip in the large, outdoor heated soaking pools. Later, explore the exceptional variety of shops and restaurants. For a unique dining experience, take a snowcat to the Montana Dinner Yurt, located two miles up the mountain. Depart from Big Sky Mountain Village out of the Summit Hotel for a 30-minute journey through the woods to the restaurant where you'll enjoy an incredible three-course meal, sledding, and live acoustic music. Visit dinner.yurt.com or call 800-666-3336 for more information and to make reservations. Reservations are required.

For information, package deals, and snow conditions go to bigskyresort.com.



The annual Pond Skis event. Photo by Chad Jones.

Escape to Yellowstone Country

advertisement



Telemark skier entering Exit Chute into South Bowl at Bridger Bowl.

Considered the heart of Montana skiing, Yellowstone Country boasts four of the five largest ski areas in the state. Here you'll find plenty of sunshine, no crowds, and tons of powdery snow. Surrounding Yellowstone National Park, each resort offers a different alpine experience. Bridger Bowl Ski Area provides a big mountain experience at small-town rates; Red Lodge Mountain serves up family-friendly fun set in a classic western atmosphere at the foot of the Beartooth Mountains; and Big Sky Resort and Moonlight Basin boast the Biggest Skiing in America®, providing guests with a premier full-service ski vacation experience.

CROSS-COUNTRY ADVENTURES

Yellowstone Country features some of the best Nordic skiing in the world. Breathtaking valleys and mountains, the ultimate in dry powder, and extraordinary wildlife viewing combine to offer skiers an unsurpassed cross-country experience. Explore the winter wonderland of Lone Mountain Resort in Big Sky, Bohart Ranch in Bozeman, the Rendezvous trails in West Yellowstone, and diverse trail systems in Yellowstone National Park and the national forests. Known as "America's First Playground," Yellowstone National Park provides skiers and snowmobilers with a magnificent backdrop featuring bubbling geysers and plentiful wildlife. Guests can even overnight in the park at the Snow Lodge at Old Faithful.

Check out yellowstonecountry.net.

MONTANA'S YELLOWSTONE COUNTRY

YELLOWSTONECOUNTRY.NET



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Montana Co-Ops – Advertorial and ad

advertisement

Snow-bound in Bridger Bowl

Ranked one of the best value ski areas in North America, Bridger Bowl, Montana, boasts more than 2,600 vertical feet, 2,000 acres of skiable terrain, and beginner and intermediate terrain that makes up more than 50 percent of the mountain. New this season is the Bridger Triple Chair Lift, which replaces two older lifts and provides more uphill capacity than before. Expert skiers will enjoy exploring 30 acres of black diamond terrain (avalanche transceiver are required). One of the last nonprofit ski areas in the country, Bridger Bowl is listed in "National Geographic's Greater Yellowstone Region Centourism Mapguide," which highlights distinctive, sustainable characteristics of the area. Be sure to check out the All-Season Powder

Round Package, which includes four days of skiing and four-night lodging starting at \$15/day/person (double occupancy).

To order or download your free "National Geographic Greater Yellowstone Region Centourism Mapguide," go to yellowstonegetourism.com. Also visit bridgerbowl.com for more information.



The popular ski town of Bozeman at the base of the Bridger Mountains

Bozeman, MT



An **Unspoiled**,
2,000 acre
Nonprofit
Community Ski Area
with
2,600' vertical
and 40' lift tickets

bridgerbowl.com



Whimsical West Yellowstone

This family-friendly Montana community boasts a lengthy winter season with 143 inches of snow, a variety of accommodations, shopping, and year-round attractions such as the Grizzly & Wolf Discovery Center, where you can see live grizzlies and wolves. Located at the western border of Yellowstone National Park, West Yellowstone is the perfect base for your winter adventure. Cross-country skiers can explore the 12-mile Rendezvous Ski Trail (open from November to April), the pet-friendly Boundary Trail, and the Yellowstone Park Riverside Trail systems. Snowmobilers can traverse more than 400 miles of groomed trails that lead to meadows deep in powder. From December 15 to March 15, take a snowcoach or snowmobile tour through Yellowstone National Park and explore

magical frozen waterfalls, frosted trees, and steaming geysers. Daily tours leave right from your hotel.

Visit YellowstoneDestination.com.



See and meet Grizzly & Wolf Discovery Center

Explore miles of groomed trails or respond to the beckoning beauty of the back country. Leave in the morning for Yellowstone's wintry wonderland.



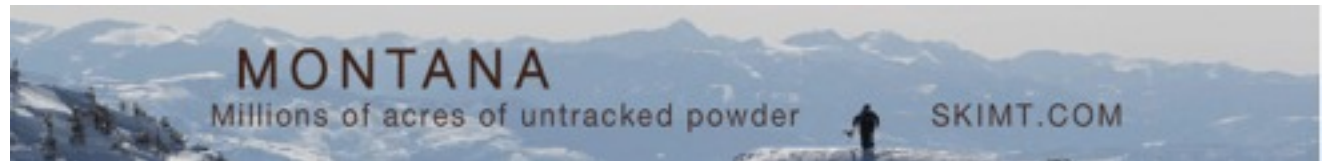
...or, find your solace in a quiet winter mountain morning.

Plan your winter adventure at
YELLOWSTONEDESTINATION.COM
West Yellowstone, Montana

ONLINE – SKI PLACEMENTS

+ Winter V1, two sizes

– [728x90](#)



+ Winter V2, two sizes

– [300x250](#)



MONTANA

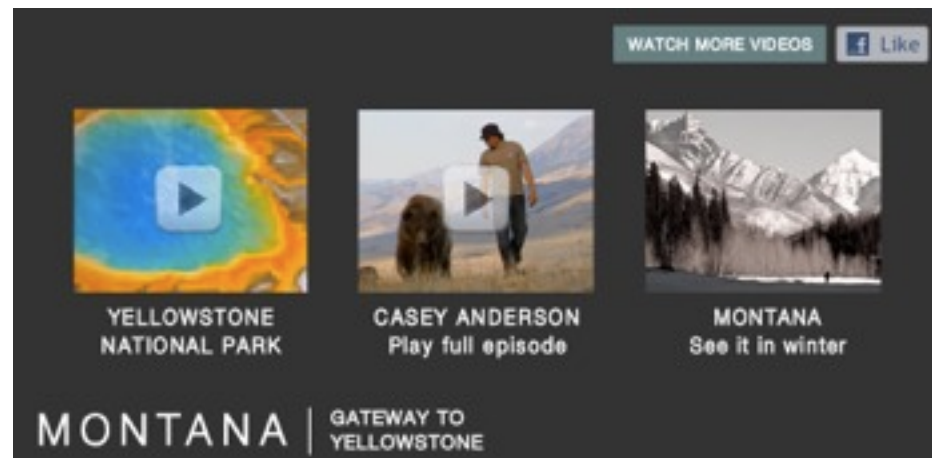
FY11 CREATIVE EVOLUTION

Influencer Recommendations:

1. **Casey Anderson**
 - + Lens: Bear/wolf biologist
2. **Conrad Anker**
 - + Lens: Climber and mountaineer
3. **Jenny Grossenbacher**
 - + Lens: Fly fisherman
4. **2-3 Others TBD**
 - + **Lens:** Artist
 - + **Lens:** Outdoor Recreation

FY11 CREATIVE EVOLUTION

- + Online brand / winter ad unit, Casey Anderson
 - + End card with winter CTA
 - + [Proposed FY11 creative](#)

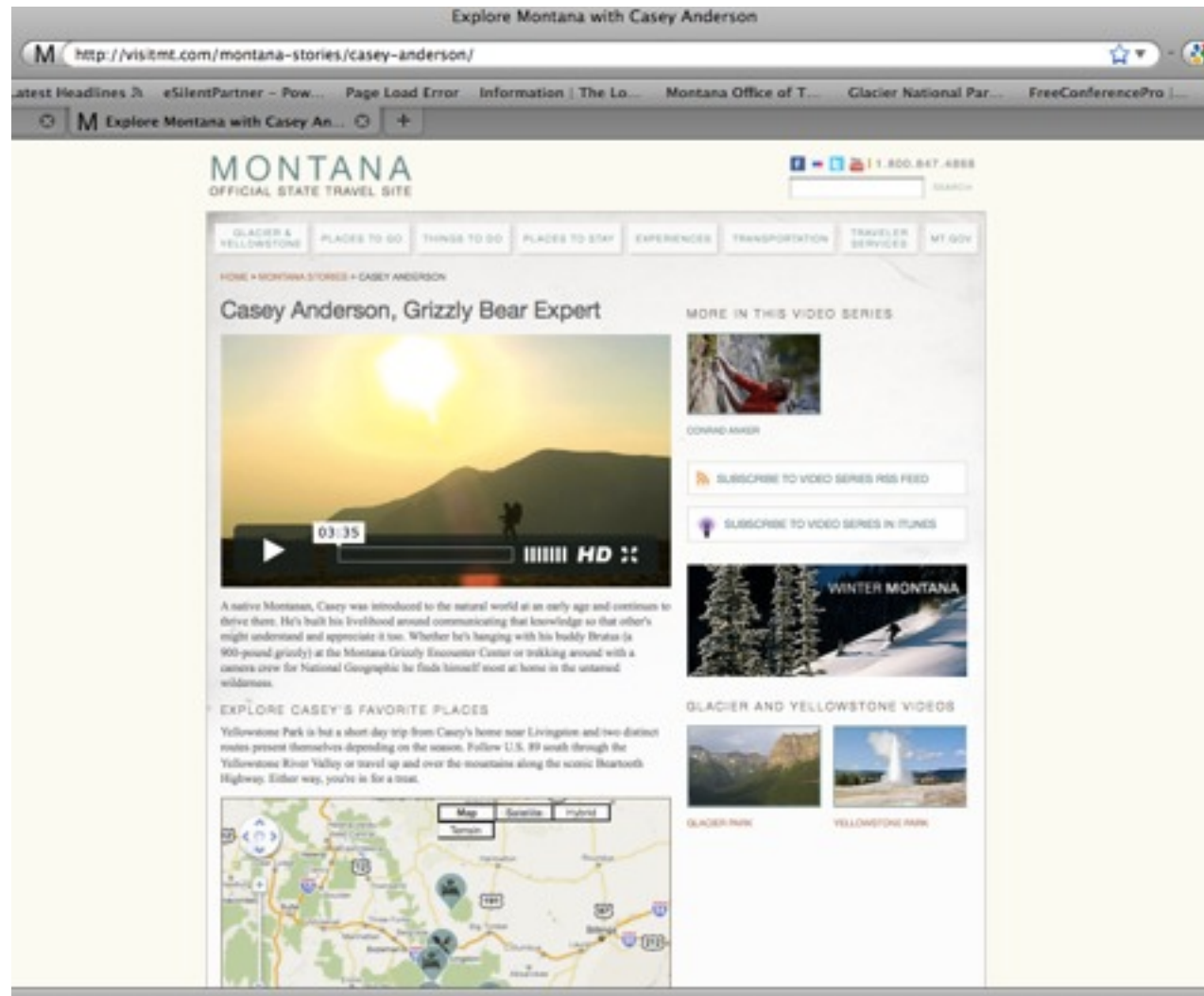


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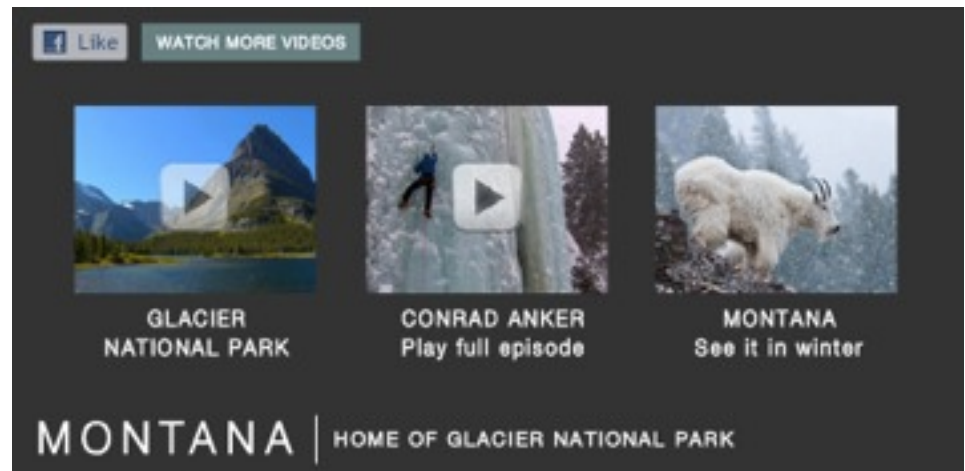
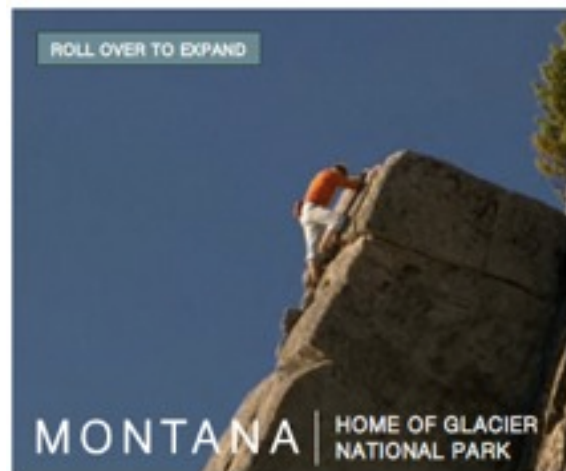
FY11 CREATIVE EVOLUTION

+ [Web pages:](#)
[Influencer.](#)
[Casey](#)
[Anderson](#)



FY11 CREATIVE EVOLUTION

- + Online brand / winter ad unit, Conrad Anker
 - + End card with winter CTA
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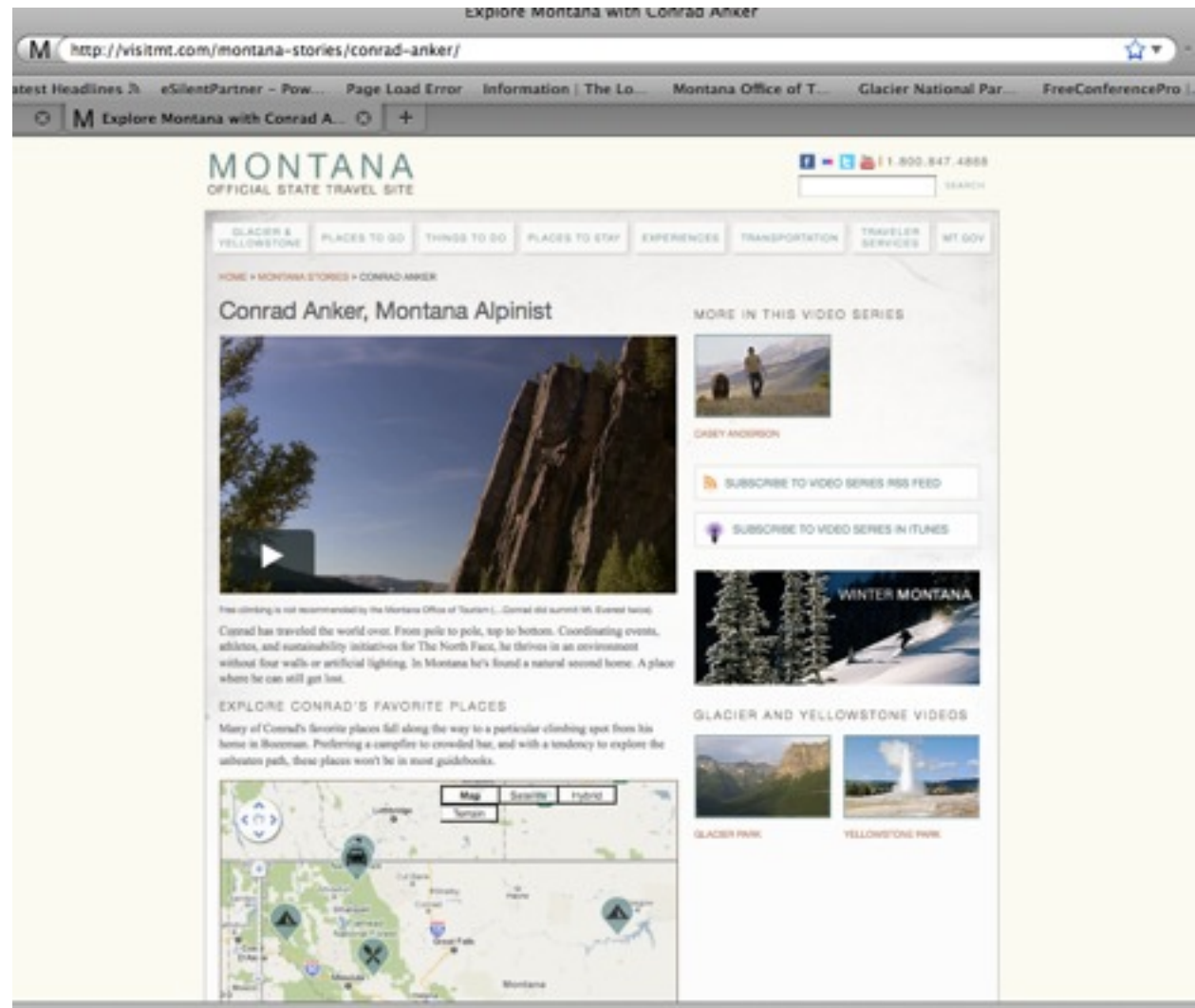


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FY11 CREATIVE EVOLUTION

+ [Web pages:](#)
[Influencer,](#)
[Conrad Anker](#)



MEDIA STRATEGY & PLAN

MEDIA

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MEDIA RECOMMENDATIONS

- + 2010 Learnings
- + Target Learnings & Insights with Relation to Media
- + Media Approach

MEDIA: 2010 LEARNINGS & IMPLICATIONS

- + Content partnerships delivered big results
 - + Implication: Look to grow opportunities where we can showcase Montana through third party content
- + Big, bold visuals provide strong impact in key markets
 - + Implications: look to continue to utilize OOH where appropriate; Seek out opportunities to bring the concept of big bold visuals into the digital space
- + Digital media continues to grow and change while MTOT 2010 results also showing great success
 - + Implications: Seek out opportunities to incorporate more video; consider different pricing models and metrics

MEDIA: TARGET INSIGHTS

- + What do Geotravelers do, and why?
 - + Price/Value is an always-important expectation
 - + The ideal mix of vacation activities is both “sweet and salty” – a yin-yang battle for balance
 - + High participation activities have low barriers, can be more spontaneous, and can/may be decided after arriving
 - + Lower participation activities require more prep, more niche/seasonal, and likely a focal point for trip planning
 - + Interest ≠ participation in some cases – can help us understand our own barriers
 - + Highest Believers gravitate towards personal reward

MEDIA: TARGET INSIGHTS

- + Audience falls into six Consumer Value Targeting (CVT) categories:
 1. Vitamin D: participate in a variety of warm weather activities
 2. Relax and Discover: Participate in activities where the central focus is on leisure, relaxation, and learning
 3. Adventure Junkie: Participate in physical activities that generally require some level of skill, training, or knowledge, and involve a greater safety risk
 4. Parka: participate in a variety of cold weather activities
 5. Adventure Lite: Participate in physical activities that do not require in depth skill, training, or knowledge, and are relatively low in risk
 6. Wildlife Observer: Participate in activities where the central focus is on viewing nature and animals in the wild

MEDIA: TARGET LEARNINGS

- + Technology is important in their lives
 - + 70% Smart Phones, 41.6% DVR/Tivo, 88.6% Cable
(Note: While mobile continues to grow their usage as a travel consideration tool is still limited)
- + Travel media is of course important but a few other areas provide opportunities
 - + History/Documentary
 - + Food

MEDIA: TARGET LEARNINGS

- + Online:
 - + Geotravelers are an internet savvy group, participating in a wide number of activities
 - + Majority of the audience has planned and booked travel online in the last 6 months
 - + Over 8 in 10 checked the weather online in the past month
 - + Social networking is booming - and a great place to exchange and share trip photos, for one
 - + Over half have viewed/downloaded video

MEDIA: TARGET LEARNINGS

+ Print:

- + Not surprisingly, Travel magazine is among the most highly read genre within the past 30 days across all groups
- + Food/Cooking magazines have high past-30 day penetration

MEDIA: TARGET LEARNINGS

+ Online Habits: Past 30 day Internet activity...

	Geotravelers
Emails	96.2%
Read News	86.4%
Check Weather	84.4%
Shop	67.0%
Social Network Site	64.7%
Play Games	60.2%
View/download video	53.6%
Listen/download music	51.7%
Travel Plan	47.2%
IM	46.2%
Read/check sports scores/info	45.2%
Blog	42.7%
Investments/stock checks	31.3%
Book Travel	28.7%
Listen/download podcasts	21.1%

MEDIA: TARGET IMPLICATIONS

- + Not just travel and adventure but connect to their cultural side (thrill and chill)
- + Continue online to be a focus for the target and for our message
- + Print still a strong option but need to continue to ensure a stand out presence if continuing in travel category due to clutter
 - + Also consider opportunities outside of Travel that can stand out
- + TV has some interesting opportunities but better opportunity is in online video
 - + Look to leverage the history/documentary angle of their TV viewing in other media to connect the culture element
- + Locally radio and out of home fit for the target

MEDIA APPROACH

Connect our target with the state and
Montana will sell itself better than anything.

Media objective: Bring Montana to life through media leveraging visuals, artists, local expert/guides and personalities.

MEDIA FLIGHTING AND BUDGET BREAKOUT

MONTANA														
2010-2011 Media Recommendation														
Efforts	October	November	December	January	February	March	April	May	June	July	August	September	Total Net Cost \$MM	
National Branding (includes nat'l co-op)	Season Neutral message				Warm Season Push								\$2,000K	
	\$400K				\$1,600K									
Key Market Branding	Co-op Message				Warm Season									\$1,775K
	\$75K				\$1,700K									
In-State			Winter				General In-State					Sept-Oct	\$425K	
			\$125K							High Plains				
										\$300K				
Grand Total														\$4.200

TOTAL WINTER MEDIA BUDGET: \$577,000

- Print: \$160,000
- Online: \$262,000
- In-State: \$125,000 (details TBD)
- WY/ID Snowmobile Co-op: \$30,000
- Other support: Winter presence in warm season campaign

NATIONAL APPROACH

- + Focus on targeted online and print media that fit within the mindset of travel/activities
 - + A time when they are likely most receptive to our message and opportunities
 - + Allows us to bring Montana to life across all three media strategy platforms
- + New for 2011
 - + Focus on expanding the activities of interest with the media consideration

PRINT APPROACH

- + Expanding consideration set to gather additional target interest (get to the chill with the thrill)
 - + Epicurean and cultural titles (still using Airline, Outdoor Recreation, Travel as well)
 - + Use targeted publications that fit within the mindset of travel/activities
- + Seeking out cross platform programs that build off success of content ideas of 2010 digital
 - + Cross platform content programs
 - + Advertorials
 - + Community involvement and input

PRINT APPROACH – consideration set

Winter Only	Publication	Publication
	Audubon	New Yorker
	Backpacker	Outdoor Photographer
	Budget Travel	Outside
	Conde Nast Traveler	Smithsonian
	Delta Sky	Sunset
	Food & Wine	Travel & Leisure
	Food Network Magazine	Wild Blue Yonder - Frontier Mag
	History Channel Magazine	
	National Geographic	
	National Geographic Traveler	
	Ski/Skiing	
	Mountain Sports and Living	
	Ski Journal	
	Powder	

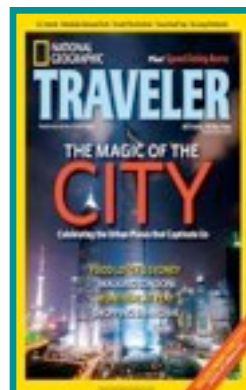
PRINT APPROACH – SCORING CRITERIA

Print considerations were scored by the following criteria:

- + Rate Base
- + Circulation Growth or Decline
- + MRI Composition/Coverage
- + Contextual Editorial Placement
- + CPM (Cost)
- + Original/Strategically relevant programs and ideas
- + Added Values

PRINT APPROACH – FY11 PARTNERS

- + Travel
- + Airline
- + Outdoor Recreation
- + Culture/ Education/ Food
- + Winter Sports



PRINT APPROACH – SCHEDULE

[illegible]

DIGITAL APPROACH

- + Focused on Travel, Enthusiast and portal to reach the Geotraveler
 - + Places where the Geotraveler goes to begin the decision making process
 - + Also considering OTAs, Mapping, Weather
 - + Ad Networks – given success of Yahoo
- + Looking for opportunities that allow us to continue to showcase all Montana has to offer
 - + Build Awareness but also offer depth of content for those interested in a further story

DIGITAL APPROACH

- + Seeking out ideas that provide the following:
 - + Custom content
 - + Large format units online
 - + Capture the impact of the OOH in the online space
 - + Video
 - + Both custom and pre-roll
- + Advanced Targeting
 - + Behavioral targeting to add reach
 - + Contextual targeting
- + Search
 - + Coverage across Montana as well as destination/activity terms

DIGITAL APPROACH – consideration set

	accuweather	MyPoints
	AOD	National Geographic
	Away Network (Orbitz)	Oddcast
	Backpacker	Platform A
	BrightRoll	Quantcast
	budgettravel.com	Sojern
	Demand Media	spotXchange
	Discovery	Trails.com
	Expedia	Travel & Leisure
	Facebook	Travel Ad Network
	Frommer's	Travel Channel
	gordonsguide.com	Travelocity
	Gorilla Nation	Trip Advisor
	Lonely Planet	Undertone Network
	Mapmyhike.com	Video Egg
	MSN	weather.com
	Yahoo Network	weatherbug
WINTER ONLY	onthesnow.com	wildernet.com
	ski & skiing	
	tetongravity.com	
	skinet.com	

DIGITAL APPROACH – SCORING CRITERIA

Proposals were scored by the following criteria:

- + Unique Visitors per Month (ensures high traffic sites)
- + Reach against Target (prioritized maximum reach while maintaining relevance to target audience)
- + Site Engagement (average time spent on site)
- + Content Relevancy (Travel specific or other fitting category)
- + Efficiency (sought and negotiated lowest CPMs)
- + Custom Program (Pursued custom programs where relevant/ possible)
- + High Impact, Unique Placements (investigated larger more interactive placements to help Montana messaging captivate and truly come alive on screen)

DIGITAL APPROACH – FY11 PARTNERS

Portal (maximize reach)

- + Yahoo (Yahoo Specific as well as Yahoo Network BT Placements)

Networks (maximize efficiency)

- + 24/7 (Behavioral and Psychographic targeting)
- + Video Egg (Cost per engagement model customized video displays)

Premium Travel Content

(Contextually Relevant Travel, Cultural and Educational Content)

- + Discovery
- + National Geographic
- + Travel Channel
- + TripAdvisor
- + Frommer's (Custom Placement)

DIGITAL APPROACH – FY11 PARTNERS

Special Print Partner Cross-Platform Program Extensions

- + Food Network.com
- + BudgetTravel.com
- + Backpacker.com

Winter

- + Ski & Skiing

Search

(Target consumers and maintain Montana as top of mind when users are searching for travel related topics online)

- + Google

DIGITAL SCHEDULE

2010-2011 Preliminary Media Recommendation																																																				
2009-2010 Seasonal Efforts	October				November				December				January				February				March				April				May				June				July				August				September							
	28-Jan	5-Jan	12-Jan	19-Jan	26-Jan	2-Jan	9-Jan	16-Jan	23-Jan	30-Jan	7-Jan	14-Jan	21-Jan	28-Jan	4-Jan	11-Jan	18-Jan	25-Jan	1-Jan	8-Jan	15-Jan	22-Jan	1-Jan	8-Jan	15-Jan	22-Jan	29-Jan	5-Jan	12-Jan	19-Jan	26-Jan	3-Jan	10-Jan	17-Jan	24-Jan	31-Jan	7-Jan	14-Jan	21-Jan	28-Jan	5-Jan	12-Jan	19-Jan	26-Jan	2-Jan	9-Jan	16-Jan	23-Jan	30-Jan	6-Jan	13-Jan	20-Jan
	Montana Tourism National Branding																																																			
	Winter Push																Core Season																Shoulder Season																			
ONLINE																																																				
24/7																																																				
Backpacker																																																				
Budget Travel																																																				
Discovery																																																				
Food Network																																																				
Frommer's																																																				
Nat Geo																																																				
Ski Net																																																				
Travel Channel																																																				
Trip Advisor																																																				
Video Egg																																																				
Yahoo!																																																				
Search																																																				
Ad serving																																																				

ADDITIONAL OPPORTUNITIES: TV



ADDITIONAL OPPORTUNITIES: TV

- + Travel Channel TV & TravelChannel.com
 - + National Parks Week & TravelBug Sweepstakes
 - + On-Air
 - + Production of 1 Custom Travel Channel Moment that will air as Montana's TV Commercial
 - + 10 x :30 integrated sweepstakes spots driving viewers to Sweeps page
 - + TV Commercial presence in Annual National Park's Event
 - + Q2 ROS TV Media Schedule
 - + Online
 - + Travel Channel Custom Dig@torial
 - + Placements across Road Trips and National Parks media
 - + "Travel Bug Sweepstakes"

SEASON-SPECIFIC (WINTER) CO-OP APPROACH

- + Look to provide partners with a broad range of opportunities
- + Built programs based on learning from current plan
 - + Packaged sites to avoid under delivery
 - + Offer packages at a variety of cost levels
 - + Offer national and key market programs

QUESTIONS & ANSWERS

Thank you.

This presentation will be available online at:
www.travelmontana.mt.gov/research/staffpre.asp

Or Contact:
Katy Peterson
Consumer Marketing Manager
Montana Office of Tourism
kapeterson@mt.gov
406-841-2870